

## AGENDA BILL

Beaverton City Council  
Beaverton, Oregon

**SUBJECT:** Retainer Agreements for Professional  
Development Training, Facilitation &  
Organization Development Services for FY  
2012-13 and FY 2013-14

**FOR AGENDA OF:** 11-13-12 **BILL NO:** 12229

**Mayor's Approval:** Darryl Nash

**DEPARTMENT OF ORIGIN:** HR neb

**DATE SUBMITTED:** 10-30-12

**CLEARANCES:** City Attorney W.B. Key  
CAO Shirley  
Purchasing J.L. Knight  
Finance H.D. Clark

**PROCEEDING:** Consent Agenda  
(Contract Review Board)

**EXHIBITS:**

1. Proposals Received
2. Excerpt From Solicitation  
#2706-13B Outlining Scope of  
Work
3. List of Consultants  
Recommended for Placement  
on Retainer Agreements

### BUDGET IMPACT

EXPENDITURE	AMOUNT	APPROPRIATION
REQUIRED \$60,000	BUDGETED \$60,000*	REQUIRED \$0

\*Account Number: 001-15-0536-326 General Fund – Human Resources Department - Citywide  
Training Account

### RECOMMENDED ACTION:

City Council, acting as Contract Review Board, awards retainer agreement contracts for the initial two (2) year term, in a form approved by the City Attorney, to the consultants listed on Exhibit 3, and approves authorizing City staff to extend the retainer agreements for three (3) additional one (1) year periods subject to Council's approval of future budgets from FY 2013-14 through FY 2016-17.

### HISTORICAL PERSPECTIVE:

In FY 2008-09, the Human Resources Department solicited proposals from qualified consultants to provide professional development training, facilitation, and organization development services to City staff. As part of this formal RFP process, selected consultants were placed on retainer agreement for an initial two (2) year term with an option to renew for two additional one (1) year periods for a total of four (4) years. The four (4) year period ended in October 2012.

Given that this process gave the City enhanced capability and flexibility to respond to internal needs in a timely manner, a subsequent request for qualifications (RFQ) was advertised in the Daily Journal of Commerce and on the City's public website in August 2012. In addition, Purchasing furnished the information to six consultants that the City had previously worked with or had been recommended.

The RFQ specified that it is the City's intent to execute a retainer agreement with selected consultants who can support the development of the City's workforce in five competency areas (Exhibit 2). It further specified that the retainer agreement will be in effect for a two (2) year period, with the option to renew up to three (3) additional one (1) year periods, for a total term not to exceed five (5) years.

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**INFORMATION FOR CONSIDERATION:**

The RFQ was advertised in the Daily Journal of Commerce on August 14, 2012. Proposals were received by 2:00 p.m. on September 7, 2012. There were 67 firms that registered on-line to view and/or download the solicitation. Twelve companies from both in-state and out-of-state submitted proposals (Exhibit 1).

The proposals were reviewed and rated by a selection committee comprised of three City staff – the Human Resources Director, an HR Business Partner, and a Program Manager within the Mayor's Office. All proposals were evaluated on the following factors: minimum requirements (35 points possible), knowledge and experience (35 points possible), cost schedule/rates (20 points possible), and availability (10 points possible). The points awarded by selection committee members were averaged to arrive at an overall score for each proposer. The RFQ stated proposers must receive a minimum of 75 points as an overall score to be placed on retainer agreement.

Staff recommends that Council award retainer agreement contracts to all of the consultants listed in Exhibit 3. Consultants selected and placed on retainer agreement will not be guaranteed a minimum level of work. After Council approves the consultant list, staff will work to execute project contracts for classes and/or services on an as needed basis. Project contracts will identify the type of services, scope of work, fee, and terms of payment for services.

## EXHIBIT 1

### CITY OF BEAVERTON PROPOSALS RECEIVED

**Project:** Professional Development Training & Organization  
Development Services #2706-13B

**Closing Date:** September 7, 2012 @ 2:00 PM

#### **Proposals Submitted:**

1. Possibilities, Inc., Portland, OR
2. BL Management Consulting LLC, Arlington VA
3. Bickmore Risk Services, Portland, OR
4. Webucator, Jamesville, NY
5. Wolff Consulting Group, Seattle, WA
6. RNR Consulting, Cleveland, OH
7. Executive Forum, Lake Oswego, OR
8. Vibrant Business Solutions, Portland, OR
9. The Gail Tycker Company, Beaverton, OR
10. Kennedy Consulting, Portland, OR
11. HR Answers, Inc., Tualatin, OR
12. InspirationWorks, LLC, West Linn, OR

## EXHIBIT 2

### SECTION 2: SCOPE OF WORK

#### 2.1 Scope of Work

The City schedules professional development sessions, as needed, to cultivate leadership and provide for the developmental needs and professional growth of employees and work groups. The City is seeking consultants to deliver training and/or facilitate sessions that support one or more of the competencies listed below. The competencies provide staff throughout the organization with a guide for continuous and measurable professional learning and growth that is focused on achieving organizational objectives and community goals.

The City anticipates selecting multiple consultants to place on Retainer Agreement to achieve a mix of professional development classes that will support staff development in the following five competency areas:

1. Leads with respect and integrity
2. Collaborates with individuals, teams, and other departments
3. Promotes and engages in two-way communication
4. Develops the knowledge, skills, and abilities of self and City staff
5. Achieves results for the community

For each workshop, class, or facilitated session within a Consultant's proposal, Consultant should identify how the training will further development in one or more competency areas. The number of classes offered in a fiscal year will be determined by the needs of the City, work groups, and individual employees. Classes may be held at one or more of the City's facilities.

#### 2.2 Competency Areas

- a. **Leads with respect and integrity:** Workshops, classes and/or facilitated sessions will focus on such things as leading with consistency, setting a personal example of what is expected, modeling respectful behavior, following through on promises and commitments, and accepting personal accountability.
- b. **Collaborates with individuals, teams, and other departments:** Workshops, classes and/or facilitated sessions will focus on such things as fostering teamwork to drive innovation, collaborative decision-making, and building cooperative relationships.
- c. **Promotes and engages in two-way communication:** Workshops, classes and/or facilitated sessions will focus on such things as methods of engaging staff, active listening, giving and receiving feedback, recognizing and showing appreciation, encouraging free expression.
- d. **Develops the knowledge, skills, and abilities of self and City staff:** Workshops, classes and/or facilitated sessions will focus on such things as providing coaching and guidance, supporting others in applying newly acquired skills and knowledge, and delegating to broaden the knowledge, skills and abilities of others.
- e. **Achieves results for the community:** Workshops, classes and/or facilitated sessions will focus on such things as leading and coping with change, being inclusive, continuous improvement, and relationship building.

### EXHIBIT 3

	Proposer	Overall Score
1	<b>BL Management Consulting, LLC</b> Arlington, Virginia	96
2	<b>Possibilities, Inc. and North Star Facilitators</b> Portland, Oregon	94
3	<b>Kennedy Consulting LLC</b> Portland, Oregon	94
4	<b>InspirationWorks, LLC</b> West Linn, Oregon	85
5	<b>HR Answers, Inc.</b> Tualatin, Oregon	82
6	<b>Vibrant Business Solutions</b> Portland, Oregon	78
7	<b>Executive Forum</b> Lake Oswego, Oregon	77
8	<b>Webucator, Inc.</b> Jamesville, New York	75

